



Only 5 star Global Balanced ETF Strategist

Based on Morningstar's ETF managed portfolio landscape database for data ending 9/30/16. No fee was paid to Morningstar for the rating, nor do we pay a fee to be included in the database. Past performance does not guarantee future results. Rankings and/or performance numbers are not representative of any one client, but an average of all clients invested in the portfolio.

VIEW RATING AND PORTFOLIO ON MORNINGSTARADVISOR.COM

- 1.) Go to Morningstaradvisor.com
- 2.) Select 'Strategy Screener' from the ETF Managed Portfolio drop-down menu
- 3.) Filter Portfolio Attributes for:
 - Universe → **Global**
 - Asset Breadth → **Balanced**
 - Portfolio Implementation → **Hybrid**
 - Primary ETF Exposure Type → **Broad Market**

